

Blaenau Gwent Local Housing Market Assessment Report March 2024



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Part 1 – LHMA Report

Introduction

- 1.1 Opinion Research Services (ORS) were appointed by Blaenau Gwent County Council (the Council) as independent consultants to assist with the production of this Local Housing Market Assessment (LHMA). ORS's role included the modelling of housing needs using the Welsh Government LHMA tool and undertaking the required stakeholder engagement.

National Policy Background

- 1.2 Section 8 of the Housing Act 1985 - Section 8 of the Housing Act 1985¹ places a statutory duty on local authorities to periodically assess the level of housing need in their area. It is vital that authorities have a comprehensive understanding of their local housing market(s) and provide a robust evidence base for effective strategic housing and planning services. Production of a Local Housing Market Assessment (LHMA) falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market. Local authorities are expected to rewrite LHMA's every five years and refresh that LHMA once during that five-year period (between years two and three) utilising section 87 of the Local Government Act 2003².
- 1.3 Independent Review of Affordable Housing Supply - The importance of LHMA's and using the best possible data on housing need and demand to inform housing policy and decisions regarding affordable housing supply, was underlined in the 2019 Independent Review of Affordable Housing Supply³. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust LHMA is the key means of identifying this evidence at the local level.
- 1.4 Planning Policy Wales - Planning Policy Wales⁴ also stresses that LHMA's form a fundamental part of the evidence base for development plans.
- 1.5 Housing (Wales) Act 2014 - In addition, local authorities must develop a homelessness strategy every four years under sections 50, 51 and 52 of the Housing (Wales) Act 2014⁵. The LHMA plays a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.

¹ 1985 Housing Act - <https://www.legislation.gov.uk/ukpga/1985/68/section/8>

² 2003 Local Government Act - <https://www.legislation.gov.uk/ukpga/2003/26/part/7>

³ Independent Review of Affordable Housing Supply - https://gov.wales/sites/default/files/publications/2019-04/independent-review-of-affordable-housing-supply-report_0.pdf

⁴ Planning Policy Wales - https://gov.wales/sites/default/files/publications/2021-02/planning-policy-wales-edition-11_0.pdf

⁵ Housing (Wales) Act 2014 - <https://www.legislation.gov.uk/anaw/2014/7/contents/enacted>

- 1.6 Equality Act 2010 - It is essential also for local authorities to consider their equality duties under the Equality Act 2010⁶ and the Welsh Public Sector Equality Duties.

Local Policy Background

- 1.7 The previous Blaenau Gwent Local Development Plan 2006-2021⁷ has expired and the council are in process of developing a new Local Development Plan 2018-2033⁸. The Local Development plan 2006-2021 set an annual housing target of 233 dwellings per annum, but between 2009 and 2019 the average level of delivery was 96 dwellings per annum.
- 1.8 The Council has consulted on the Preferred Strategy for the Replacement Local Development Plan 2018-2033 which aims to make provision for 2,115 dwellings over the Plan Period. The Replacement Deposit Plan is under preparation with public consultation on the Deposit Plan scheduled to take place in Spring 2025.

Governance and Consultation

Blaenau Gwent

Interviews with Stakeholders

- 1.9 Video interviews were held with 5 different stakeholders within Blaenau Gwent in January and February 2025. Key stakeholders were asked to answer a series of questions which allowed them to discuss their specialist knowledge on housing in Blaenau Gwent. The stakeholders discussed areas such as Temporary Housing, Homelessness, Affordable Housing and Community Housing.
- 1.10 Those interviewed were from associations such as: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First and Torfaen CBC. In addition, United Welsh Housing Association responded by email. All those interviewed gave consent to record the interviews to ensure accuracy within the report. The recordings are held securely and will be deleted when the project is complete. Another 15 potential interviewees were approached but did not respond or did not have any information to share.

Key points about the general feeling around the need for housing in Blaenau Gwent

- 1.11 Developments have a focus on providing 3-bedroom properties, yet there is a general demand for smaller and larger dwellings for single persons and families who are homeless or within Temporary Accommodation. Most of the temporary accommodations are full due to there not being a supply of move-on housing suitable for single persons or families:
- 1.12 "We have got a lot of single persons homeless and [temporary accommodation]. There is not a lot of 1-bed properties available to be honest, within the borough. And a 4-bed need as well, 4 beds are

⁶ Equality Act 2010 - <https://www.legislation.gov.uk/ukpga/2010/15/contents>

⁷ [Adopted LDP | Blaenau Gwent CBC \(blaenau-gwent.gov.uk\)](https://www.blaenau-gwent.gov.uk/adopted-ldp)

⁸ [full doc preferred strategy english.pdf \(blaenau-gwent.gov.uk\)](https://www.blaenau-gwent.gov.uk/full-doc-preferred-strategy-english.pdf)

very, very rare to come by. When we have new developments and new sites they are mainly aimed at 3 bed houses.”

- 1.13 “I would say that I agree that highest number of people requiring social housing on the Common Housing Register are single persons requiring a 1 bed property.”
- 1.14 Housing supply is not meeting the demand in Blaenau Gwent. There are a long waiting lists for households looking for affordable housing and for people who are currently homeless or living in temporary accommodation:
- 1.15 “The rents in the private sector are quite high making that unaffordable, that is a real issue on the waiting list there are 3000 people waiting to be accommodated. We accommodate about 60% in terms of accommodating homelessness. ”
- 1.16 “We do aim for a 90-day, 3 month turn around for someone being in [temporary accommodation]. Obviously, we can’t always stick to that because obviously lack of availability.”

Key Points on the current provision meeting need in Blaenau Gwent

- 1.17 The general feeling across the interview was the Blaenau Gwent is not meeting the need for Affordable Housing. There is a high demand for those in temporary accommodation and affordable homes that are 1-bedroom or 4+ bedrooms. Also, a demand for young people, the ageing population and accessible homes.
- 1.18 People are on waiting lists for affordable houses for too long and some interviewees saw this as being at least in part due to their not being deemed a priority, though the main problem identified is the lack of housing:
- 1.19 “You’ve got people in refuges for years and there is just no housing.”

Key points on the level of need changing and how well-equipped Blaenau Gwent are.

- 1.20 Within the next 12 months, generally the level of need is going to continue to rise.
- 1.21 It is believed that the cost of living is going to continue to affect residents in Blaenau Gwent thus leading to the demand for affordable housing to keep increasing. The area is deprived and there is a struggle to find and keep jobs. There is a constant demographic change; there are an increasing proportion of older people needing more support. Younger people cannot afford to move out from their family homes and older people need more support when it comes to their retirement.
- 1.22 Interviewees said there is a knock-on effect from landlords beginning to sell their properties or not maintaining them for the families that are renting. From this, there is an expectation of an increase in evictions over the next year:
- 1.23 “With cost of living and the raised interest’s rates means we will see a peak in the next 6-12 months.”

- 1.24 “ I do see more evictions coming through possibly in the next 12 months say. Only because what we’ve seen as well is landlords are not maintaining their properties, so we are having a lot of people coming in with environmental health issues.”
- 1.25 Overall, interviewees do not feel Blaenau Gwent are equipped for the fast-paced growth in demand for housing.
- 1.26 Blaenau Gwent as seen as having plenty of land that could be used to provide housing. It is a general feeling that with the access to the right resources and funding for projects, like First Homes, Blaenau Gwent will start to meet the demand for Affordable Housing. Housing First has been popular and it is believed that more projects like this will help:
- 1.27 “I’d like to see if we could work on like different projects. The Housing First project is going really well in Blaenau Gwent. Obviously if we could access more Welsh Government funding to access or set up another one of those projects.”
- 1.28 “Like if I am honest, we have got a lot of land in Blaenau Gwent, but it’s just comes down to resources and funding to just do something.”
- 1.29 “We have lots of land in Blaenau Gwent if you work in the cities, land shortage may be an issue, we don’t have that. Whether it is all suitable land for housing is something that would need to be looked at.”

2. Overview of Assessment and Methodology

Methodology, inputs, and assumptions

- 1.1 The additional housing needs estimates are determined using the LHMA Tool. This Tool uses a formulaic approach to allocate the additional housing need, formed from the existing unmet need and the newly arising need (change in the household projections over the LHMA period), to the different housing tenures. All existing unmet need is allocated to affordable housing and assumed to be covered during the first five years of the LHMA period. The newly arising need is allocated between market and affordable housing using a formulaic approach.
- 1.2 By housing market area (HMA), the LHMA Tool provides default data inputs for rent, house price paid and household projections (used to generate the newly arising need) with local authorities providing the income percentile distributions, existing unmet need and the planned supply and turnover of existing stock. The latter two data inputs are considered over the first five years only of the LHMA period and are fully allocated to affordable housing. This is because it becomes less accurate to predict supply beyond the first five years of the LHMA period. A local authority can have up to 20 HMAs which are defined using wards, middle-layer super output areas (MSOAs) or lower-layer super output areas (LSOAs). Each HMA can have up to 40 wards, MSOAs or LSOAs.
- 1.3 The input data together with a number of assumptions is used to generate an income level above which households would be considered able to meet their needs in the market and a lower income level below which households are considered to be in need of social rent. The intermediate households are those not allocated to market housing or social rent. The LHMA Tool also forecasts how the data inputs may change over the first five years of the LHMA period.
- 1.4 The output tables from the LHMA Tool are used as the starting point for development plans to provide the range of LHMA additional housing need estimates.
- 1.5 In Appendix A, we have completed the Key Assumptions Table to set out to assumptions taken. Within the standard LHMA Tool model, we have made three key assumptions:

We have used bespoke household projections based on a local growth scenario, rather than use the standard Welsh Government projections. However, Chapter 4 contains the outputs from the three main Welsh Government projections;

For the level of existing need, we have excluded anyone who is currently resident in affordable housing in Blaenau Gwent. This is because if they move to a more suitable home, they will free a property for another household to move into. Counting the need of existing households seeking to move, without counting the supply they would create, would be an overestimate of housing need; and

For household income, we have used CACI Paycheck data, but this includes income from housing benefit. Counting this as household income would make households who cannot afford to meet their own rental costs appear to have a higher income than they otherwise do and some

may appear to be able to afford intermediate housing. However, in practice they receive housing benefit because they cannot cover their own rents, so it is necessary remove housing benefit from the incomes. Across Blaenau Gwent, over 8,000 households receive housing benefit at an average value of around £5,000 per annum and also all have incomes below £25,000 per annum. CACI Paycheck includes income by £5,000 bands, so we therefore removed housing benefit from over 8,000 households' incomes by lowering their incomes by one band in the CACI Paycheck data.

Housing Market Areas

- ^{1.6} HMAs are areas that have been defined geographically based on the functional areas where people currently live and would be willing to move home without changing jobs, recognising that housing markets are not constrained by administrative boundaries. A number of key factors need to be considered when defining these areas, including the broad price of housing (to consider 'transferability' within the market) and major transport links by road or rail (to take account of commuting patterns).
- ^{1.7} In Blaenau Gwent, the 4 key towns of Abertillery, Brynmawr, Ebbw Vale and Tredegar have their own identities and form distinct HMAs. In terms of the HMAs used in this report, they are formed from the 4 main towns and their surrounding areas using electoral ward data as indicated below.

Lower Ebbw Fach Valley Area - Cwmtillery Ward, Abertillery and Six Bells Ward and Llanhilleth Ward

Ebbw Fawr Valley Area - Beaufort Ward, Rassau and Garnlydan Ward, Ebbw Vale North Ward, Ebbw Vale South Ward and Cwm Ward

Upper Ebbw Fach Valley Area – Brynmawr, Nantyglo, Blaina

Sirhowy Valley -Sirhowy Ward, Tredegar Ward and Georgetown Ward

3. Overview of Housing Market and Socio-economic and Demographic Trends

Housing Market Analysis by Tenure

- 3.1 Blaenau Gwent is a County borough in South East Wales covering around 42 square miles and comprises 4 main settlements, Abertillery, Brynmawr, Ebbw Vale and Tredegar and a series of smaller towns and villages.
- 3.2 At the time of the 2021 Census, the area contained 30,300 occupied dwellings and around 2,500 vacant homes, so around 7.7% of the housing stock was vacant. Only around 50 were second homes, so this has a minimal impact upon on local housing needs and the Welsh Language. The population of Blaenau Gwent in 2021 was recorded as 66,900.
- 3.3 In the tables below, we consider some of the key data for the housing stock of Blaenau Gwent.
- 3.4 Table 1 shows that more than half of households in Blaenau Gwent are owner occupiers, with 22% of households living in affordable housing.

Table 1: Tenure by Housing Market Area

Housing Market Area	Owned	Affordable	Private Rent	Vacant or second home
Lower Ebbw Fach Valley Area	54.8%	17.1%	19.8%	8.2%
Ebbw Fawr Valley Area	56.9%	21.8%	14.1%	7.2%
Upper Ebbw Fach Valley Area	54.4%	24.6%	13.5%	7.6%
Sirhowy Valley Area	55.5%	24.4%	12.1%	8.0%
Blaenau Gwent Total	55.6%	21.9%	14.9%	7.7%

- 3.5 Household Types are very consistent across the HMAs in Blaenau Gwent. Around a third of the population live on their own and another quarter are couple without children. Another quarter of households are couple with children and around 15% of households are lone parents.

Table 2: Household Type

HMA	Single Person	Couple No Children	Couple with Children - 1 or more Dependent	Couple with Children - All Non Dependent	Lone parent with 1 or more Dependent children	Lone parent with all children Non Dependent	Other
Lower Ebbw Fach Valley Area	35.4%	23.5%	15.0%	7.9%	8.7%	5.5%	4.0%
Ebbw Fawr Valley Area	31.7%	25.3%	15.7%	8.3%	9.3%	5.4%	4.4%
Upper Ebbw Fach Valley Area	33.8%	24.4%	16.2%	7.8%	8.6%	5.3%	3.8%
Sirhowy Valley Area	34.1%	23.7%	16.0%	7.7%	8.9%	5.7%	3.9%
Blaenau Gwent Total	33.5%	24.3%	15.7%	8.0%	8.9%	5.5%	4.1%

^{3.6} The next four tables show that the profile of the population of Blaenau Gwent is very consistent across the three housing market areas. Around 19% of the population is retirement age, around 30% have a long-term health problem, with 13% of the entire population reporting that this limits their activities a lot. The average household size is 2,19 persons, with slightly larger average sizes in owner occupied housing and smaller in the private rented sector.

Table 3: Age Profile of the Population

HMA	0-15 years	16-65 years	66 years or more
Lower Ebbw Fach Valley Area	17.4%	64.1%	18.5%
Ebbw Fawr Valley Area	17.6%	63.0%	19.4%
Upper Ebbw Fach Valley Area	18.1%	62.8%	19.1%
Sirhowy Valley Area	17.4%	63.3%	19.3%
Blaenau Gwent Total	17.6%	63.3%	19.1%

Table 4: Long-term Limiting Health Problems

HMA	Day-to-day activities limited a lot	Day-to-day activities limited a little	Has long term physical or mental health condition but day-to-day activities are not limited	No long term physical or mental health conditions
Lower Ebbw Fach Valley Area	13.9%	12.5%	5.7%	68.0%
Ebbw Fawr Valley Area	12.4%	11.5%	6.1%	70.0%
Upper Ebbw Fach Valley Area	13.2%	11.3%	5.8%	69.8%
Sirhowy Valley Area	14.2%	11.1%	5.3%	69.3%
Blaenau Gwent Total	13.3%	11.6%	5.8%	69.3%

Table 5: Ethnic Group

HMA	Asian, Asian British or Asian Welsh	Black, Black British, Black Welsh, Caribbean or African	Mixed or Multiple ethnic groups	White	Other ethnic group
Lower Ebbw Fach Valley Area	0.8%	0.2%	0.9%	98.0%	0.2%
Ebbw Fawr Valley Area	0.9%	0.2%	0.8%	97.8%	0.3%
Upper Ebbw Fach Valley Area	1.3%	0.2%	1.0%	97.4%	0.2%
Sirhowy Valley Area	0.8%	0.1%	0.8%	98.2%	0.2%
Blaenau Gwent Total	0.9%	0.2%	0.9%	97.8%	0.2%

Table 6: Average Household Size

HMA	Owned	Social Rent	Private Rent	Total
Lower Ebbw Fach Valley Area	2.19	2.08	2.12	2.15
Ebbw Fawr Valley Area	2.25	2.21	2.13	2.22
Upper Ebbw Fach Valley Area	2.26	2.13	2.12	2.20
Sirhowy Valley Area	2.25	2.12	1.97	2.16
Blaenau Gwent Total	2.24	2.15	2.10	2.19

^{3.8} In terms of the housing stock of Blaenau Gwent, house prices in Lower Ebbw Fach Valley are well below the rest of the borough. However, house prices and affordability are dependent upon household incomes. Table 8 shows that nearly 20% of the borough has a household income (excluding housing benefit but including all other benefits) of less than £10,000, with another 36% having incomes below £30,000 per annum. Even with house prices being just over £100,000 an income close to £30,000 would be required to service a mortgage.

Table 7: House Prices and Sales

HMA	Median House Prices 2023
Lower Ebbw Fach Valley Area	£85,287
Ebbw Fawr Valley Area	£113,716
Upper Ebbw Fach Valley Area	£113,717
Sirhowy Valley Area	£118,660
Blaenau Gwent Total	£111,540

Table 8: Household Income

HMA	£0k-10k	£10k-20k	£20k-30k	£30k-40k	£40k-50k	£50k-60k	£60K+
Lower Ebbw Fach Valley Area	19.0%	19.8%	15.6%	11.8%	8.5%	6.1%	19.2%
Ebbw Fawr Valley Area	17.8%	20.1%	16.9%	13.7%	10.4%	8.0%	13.1%
Upper Ebbw Fach Valley Area	19.2%	20.5%	16.6%	13.0%	9.7%	7.2%	13.8%
Sirhowy Valley Area	19.4%	20.3%	16.3%	12.8%	9.5%	7.2%	14.4%
Blaenau Gwent Total	18.7%	20.2%	16.4%	12.9%	9.6%	7.2%	15.1%

^{3.9} Historic data for affordability is only available for local authorities in Wales but can be compared to the Welsh averages. Table 9 shows that the ratio of median house prices relative to median local incomes became much more expensive after 2000, but since 2005 the relative price of properties in relation to income has remained stable in Wales and shows some variation in Blaenau Gwent, but not rapid growth.

Table 9: Affordability Median House Price to Median Workplace Income

Area	2000	2005	2010	2015	2020	2021	2022
Blaenau Gwent	2.18	3.79	3.9	3.38	3.01	3.61	4.61
Wales	3.26	6.01	5.82	5.75	5.85	6.49	6.21

3.10 Tables 10 and 11 set out the current rents required for the private sector in Blaenau Gwent. We would caution that they are based upon a limited dataset collected by the Welsh Government of 456 properties which includes only 44 one-bedroom properties and 15 properties with four or more bedrooms.

Table 10: Private Rental Costs: 30th Percentile Rents

HMA	One bedroom	Two bedrooms	Three bedrooms	Four+ bedrooms
Lower Ebbw Fach Valley Area	£312	£420	£492	£590
Ebbw Fawr Valley Area	£330	£450	£528	£495
Upper Ebbw Fach Valley Area	£355	£420	£450	£540
Sirhowy Valley Area	£306	£400	£445	£534
Blaenau Gwent Total	£326	£420	£475	£540

Table 11: Private Rental Costs: Median Rents

HMA	One bedroom	Two bedrooms	Three bedrooms	Four+ bedrooms
Lower Ebbw Fach Valley Area	£363	£450	£550	£695
Ebbw Fawr Valley Area	£425	£500	£613	£623
Upper Ebbw Fach Valley Area	£420	£450	£500	£632
Sirhowy Valley Area	£360	£450	£488	£616
Blaenau Gwent Total	£392	£450	£540	£640

^{3.11} Table 12 shows that employment in Blaenau Gwent is not very localised. Just under 10% of the population work from home, and 25% work within 10 km of their homes, but over 20% travel more than 10 km to their jobs, with many heading outside the borough.

Table 12: Travel to Work 16-64 Years Old

HMA	Less than 10km	10km to less than 30km	30km and over	Works mainly from home	Not in employment or works mainly offshore, in no fixed place or outside the UK
Lower Ebbw Fach Valley Area	25.2%	19.2%	3.0%	9.6%	43.1%
Ebbw Fawr Valley Area	27.8%	16.3%	4.8%	9.4%	41.7%
Upper Ebbw Fach Valley Area	24.2%	19.4%	4.4%	8.3%	43.7%
Sirhowy Valley Area	26.2%	15.5%	5.4%	10.2%	42.7%
Blaenau Gwent Total	25.9%	17.6%	4.4%	9.4%	42.8%

Specific Housing Needs Requirements

a) Accessible and adapted housing provision	
Local policies/ strategies	Blaenau Gwent Housing Support Programme Needs Assessment (2021) Blaenau Gwent Housing Support Programme Strategy (2022-2026)
Property needs (key section)	Low level appliances, stair rails, barriers free, sheltered housing, housing with care, wheelchair accessibility.
Suitable for	People with limited mobility and/or dexterity, need for low level care, wheelchair users.
Evidence including data sources (key section)	1) The housing register contains 359 households who require an adapted home, 7% of applicants for housing are aged over 55 years and require an adapted home.
External stakeholder consultation and engagement	Who was consulted and how the consultation was undertaken. What were the findings? Those interviewed were from: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First. In addition, United Welsh Housing Association responded by email.
Key Issues identified	The highest number of people requiring social housing on the Common Housing Register are single persons requiring a 1 bed property." The general feeling across the interviews was the Blaenau Gwent is not meeting the need for Affordable Housing. There is a high demand for those in temporary accommodation and affordable homes that are 1-bedroom or 4+ bedrooms. Also, a demand for young people, the ageing population and accessible homes.

b) Multi-generational and/or larger families requiring larger properties	
Local policies/ strategies	N/A
Property needs (key section)	Larger properties to accommodate households who are currently overcrowded.
Suitable for	Larger families.

Evidence including data sources (key section)	<ol style="list-style-type: none"> 1) The UK Census of Population showed a total of 158 social rented homes in Blaenau Gwent with 4+ bedrooms. This is 2% of the social rented stock. 2) 1,106 social rented properties contained four or more people and 295 social rented properties in Blaenau Gwent were overcrowded. 3) The LHMA tool shows a need for 9 social rented properties per annum with 4+ bedrooms.
External stakeholder consultation and engagement	<p>Who was consulted and how the consultation was undertaken. What were the findings?</p> <p>Those interviewed were from: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First. In addition, United Welsh Housing Association responded by email.</p>
Key Issues identified	There is a high demand for affordable homes that contain 4+ bedrooms.

c) Non-permanent housing	
Local policies/ strategies	Gwent Homelessness Strategy – Blaenau Gwent Action Plan 2018 Blaenau Gwent Supported Housing Needs Assessment 2021
Property needs (key section)	Good quality temporary accommodation
Suitable for	Homeless households (permanent housing is the preferred choice but temporary housing is considered where there is currently insufficient permanent housing to meet the needs).
Evidence including data sources (key section)	<ol style="list-style-type: none"> 1) A need to review the current provision and work with landlords to provide a higher quality offer to reduce Bed and Breakfast use. 2) Around 40 units recorded so not a large part of the housing stock
External stakeholder consultation and engagement	<p>Who was consulted and how the consultation was undertaken. What were the findings?</p> <p>Those interviewed were from: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First. In addition, United Welsh Housing Association responded by email.</p>
Key Issues identified	Developments have a focus on providing 3 bedroom properties, yet there is a general demand for smaller and larger dwellings for single persons and families who are homeless or within Temporary Accommodation. Most of the temporary accommodations are full due to there not being a supply of move-on housing suitable for single persons or families.

	<p>Housing supply is not meeting the demand in Blaenau Gwent. There are a long waiting lists for households looking for affordable housing and for people who are currently homeless or living in temporary accommodation.</p> <p>People are on waiting lists for affordable houses for too long and the main problem identified is the lack of housing.</p> <p>Interviewees said there is a knock-on effect from landlords beginning to sell their properties or not maintaining them for the families that are renting. From this, there is an expectation of an increase in evictions over the next year.</p> <p>It is a general feeling that with the access to the right resources and funding for projects, like First Homes, Blaenau Gwent will start to meet the demand for Affordable Housing. Housing First has been popular and it is believed that more projects like this will help.</p>
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d) Housing, care and support needs	
Local policies/ strategies	Blaenau Gwent Housing Support Programme Needs Assessment (2021) Blaenau Gwent Housing Support Programme Strategy (2022-2026)
Property needs (key section)	Extra care, contemporary sheltered housing, supported living for people with a learning disability and/or ASD, temporary supported housing
Suitable for	For young people coming out of care, older persons, people with a learning disability learning to live independently, people with mental health issues, people with sensory impairment and those at risk of domestic abuse
Evidence including data sources (key section)	<p>1) A growing need for accommodation for looked after children, A projected growth in the number of older persons who find self-care difficult.</p> <p>A growth in those with learning disabilities</p> <p>More people are reporting mental health problems</p> <p>The number of people with sensory impairments is falling</p> <p>Blaenau Gwent has a relatively high rate of domestic abuse incidents.</p>
External stakeholder consultation and engagement	Who was consulted and how the consultation was undertaken. What were the findings?

	Those interviewed were from: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First. In addition, United Welsh Housing Association responded by email.
Key Issues identified	<p>Housing supply is not meeting the demand in Blaenau Gwent. There are a long waiting lists for households looking for affordable housing and for people who are currently homeless or living in temporary accommodation.</p> <p>There is a high demand for those in temporary accommodation and affordable homes that are 1-bedroom or 4+ bedrooms. Also, a demand for young people, the ageing population and accessible homes.</p> <p>Overall, interviewees do not feel Blaenau Gwent are equipped for the fast-paced growth in demand for housing. Blaenau Gwent as seen as having plenty of land that could be used to provide housing. It is a general feeling that with the access to the right resources and funding for projects, like First Homes, Blaenau Gwent will start to meet the demand for Affordable Housing.</p>

e) Locational needs for student accommodation	
Local policies/ strategies	N/A – Coleg Gwent in Ebbw Vale is the largest further education provider in Blaenau Gwent, but this focuses upon A-level and vocational courses for the resident population of Blaenau Gwent, with almost all students residing with their parents or in general households.
Land needs (key section)	N/A
Evidence including data sources (key section)	<p>1) The UK Census of Population 2021 shows a total of 24 people aged 18-29 years living in all student households in Blaenau Gwent, which could include two students living as a couple.</p> <p>A further 22 students aged 18-29 years live on their own.</p>
External stakeholder consultation and engagement	<p>Who was consulted and how the consultation was undertaken. What were the findings?</p> <p>Those interviewed were from: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First. In</p>

	addition, United Welsh Housing Association responded by email.
Key Issues identified	None

f) Locational needs for people with physical or cultural needs	
Local policies/ strategies	N/A
Property needs (key section)	None
Suitable for	E.g. for people with physical or cultural needs
Evidence including data sources (key section)	<ol style="list-style-type: none"> 1) the UK Census of Population shows a total of 287 Muslim, 119 Buddhists, 108 Sikhs, 76 Hindus and 10 Jewish people in Blaenau Gwent. There is one mosque in Abertillery. 2) 97.8% of the population of Blaenau Gwent are White, with a further 0.8% being Mixed ethnicity. 0.9% are Asian. 3) 2.1% of the population of Blaenau Gwent were records in the UK Census of Population 2021 as being gay, lesbian or bisexual.
External stakeholder consultation and engagement	<p>Who was consulted and how the consultation was undertaken. What were the findings?</p> <p>Those interviewed were from: Tai Calon, Cyfannol Women's Aid, BGCBC Housing Solutions Team: Housing First. In addition, United Welsh Housing Association responded by email.</p>
Key Issues identified	None

4. Range of additional housing need estimates

- 4.1 This section includes the outputs from the summary tables from the LHMA Tool sheet 'Summary tables for LHMA Report'. The summary tables themselves have been included in Appendix B.
- 4.2 The outputs are based upon 4 set of household projections:
- A bespoke Local Growth Scenario** – This projection is in line with local growth aspirations and takes account of the Blaenau Gwent's regeneration initiatives to increase economic activity, reduce unemployment and out-migration (for example, through the maximisation of the Cardiff Capital Region City Deal and Tech Valleys Enterprise Zone initiatives). This is a level which is considered appropriate by the Council to support local economic growth and has a higher dwelling delivery scenario than the official Welsh Government projections.
 - Welsh Government 2018 based principal projection.** - The Welsh Government principal projection is the main projection, and is based on assumptions about future fertility, mortality and migration considered to best reflect demographic patterns at that time. It is produced on a consistent basis for all Welsh authorities and for Blaenau Gwent shows an average household growth of 36 per annum for 2022-2037.
 - Welsh Government 2018 based higher variant projection.** - The Welsh Government higher variant projection and is based on high fertility, life expectancy and migration assumptions. It is produced on a consistent basis for all Welsh authorities and for Blaenau Gwent shows an average household growth of 78 per annum for 2022-2037.
 - Welsh Government 2018 based lower variant projection.** - The Welsh Government lower variant projection and is based on low fertility, life expectancy and migration assumptions. It is produced on a consistent basis for all Welsh authorities and for Blaenau Gwent shows an average household growth of -20 per annum for 2022-2037
- 4.3 For a given household projection basis, there are four tables presenting the following annual additional housing need estimates set out in Appendix B. The tables below represent summary outputs to show the main findings. We have incorporated the outputs for each of the 4 projections into one table, so that outputs can be compared more easily.
- 4.4 In Table 12, the overall annual affordable and market needs for the first 5 years are reported for each scenario, including both gross and net need. For Table 13, the annual need for the first 5 years are reported by tenure. For Table 14, the annual need for social housing is reported by size. For Table 15 the affordable need for 15 years is reported for each scenario and for Figure 16 a summary for each HMA is included for the core scenario of 117 dwellings per annum.

Table 12: Summary of Overall Annual Market and Affordable Housing Needs for Years 1-5 from Each Projection

	117 Dwellings per annum scenario	Principal projection	Higher variant projection	Lower variant projection
Annual gross need for affordable from current need for years 1-5 (A)	291	291	291	291
Annual gross need for affordable from newly arising need for years 1-5 (B)	46	14	30	0
Annual gross need for affordable from all sources for years 1-5 (C = A+B)	337	305	321	291
Annual gross need for market housing from newly arising for years 1-5 (D)	71	22	48	0
Annual gross need for all housing for years 1-5 (E = C+D)	408	327	369	291
Annual net need for affordable housing years 1-5 (C – projected turnover in affordable housing)	59	42	50	34

Table 13: Summary of Overall Annual Market and Affordable Housing Needs by Tenure for Years 1-5 from Each Projection

	117 Dwellings per annum scenario	Principal projection	Higher variant projection	Lower variant projection
Annual need for Social Rent	42	32	36	27
Annual need for Intermediate Rent	10	3	7	0
Annual need for Low Cost Home Ownership	7	7	7	7
Annual need for Market Rent	35	11	23	0
Annual need for Owner Occupiers	36	11	24	0
Annual need for all housing	130	64	98	34

Table 14: Summary of Size Mix for Annual Social Housing Needs for Years 1-5 from Each Projection

	117 Dwellings per annum scenario	Principal projection	Higher variant projection	Lower variant projection
1 bed	32	23	27	19
2 bedroom	0	0	0	0
3 bedroom	0	0	0	0
4+ bedroom	9	8	9	8

Table 15: Summary of Affordable Housing Needs Over 15 Years by Tenure for Each Projection

	117 Dwellings per annum scenario	Principal projection	Higher variant projection	Lower variant projection
Annual need for Social Rent	560	266	415	137
Annual need for Intermediate Rent and Low Cost Home Ownership	191	82	138	34

Table 16: Summary of Affordable Housing Needs for Each HMA Over 15 Years for 117 Dwelling Per Annum Scenario

	Total Estimated Affordable Housing Need (over 15 year LHMA period)	Percentage of Total Need
Sirhowy Valley Area	152 Affordable Houses	20%
Ebbw Fawr Valley Area	328 Affordable Houses	44%
Upper Ebbw Fawr Valley Area	118 Affordable Houses	16%
Lower Ebbw Fawr Valley Area	152 Affordable Houses	20%
Affordable Housing Sub Total	750 affordable houses (Approx. split of 75% social rent and 25% intermediate/LCHO)	41%
Market Housing Sub Total	1,065 Market houses	59%
Blaenau Gwent Total	1,815	

5. LHMA additional housing need estimates

- 5.1 For this study, we have based the core analysis on the bespoke local growth scenario projection.
- 5.2 The key driver of housing need in Blaenau Gwent is the existing backlog of need, not newly arising need. While the local growth scenario shows a higher rate of need yearly than any of the Welsh Government scenarios, the differences are not large, ranging from 34-59 dwellings per annum due to the impact of existing need.
- 5.3 A comparison with the Blaenau Gwent LHMA 2018 outputs has been included in Appendix C. This study was undertaken using the previous Welsh Government LHMA guidance, often known as the 'bath-tub method'. This was an expanded model compared to the current LHMA Tool in that it considered the gross, not net, newly arising need and also considered existing households falling into need. Therefore, the results would be expected to be the same and they were in practice very different.
- 5.4 The Blaenau Gwent LHMA 2018 showed a higher level of affordable housing need due to the model counting the gross need for affordable housing from all newly forming and in-migrant households, while the current model takes a net need based upon overall household growth. The Blaenau Gwent LHMA 2018 did not include an assessment of market housing needs, but for affordable housing need it did identify a need for 1 and 4+ bedroom affordable properties, in line with this current study. However, the scale of the need was much higher and the 2018 model allowed for a surplus of need for 2 and 3 bedroom properties which offset the overall need for affordable housing.

6. Quality assurance statement

- ^{6.1} Figures in the narrative of this report match those in the tables, figures are arithmetically correct, rounded consistently, data is fully sourced, and figures / charts are labelled in full and consistently. The LHMA Tool produces rounded estimates for some tables and also does not report negative numbers, so some totals may not exactly match the individual components for those tables. This particularly applies with HMA level outputs which may not sum to the Blaenau Gwent growth level which has the effect of marginally over estimating need in the first 5 years and does not significantly impact the key findings

Appendix A – Key Issues Tables

Key Issues Table 1 – Key data inputs

Key data inputs	Key issues identified with the data inputs
1. Housing Market Areas (HMAs)	1.None 2. 3.
2. Household data	1.None 2. 3.
3. Rent data	1.None 2. 3.
4. Income data	1.CACI Paycheck includes all benefits, including housing benefit. This leads to households appearing to have more income than is really the case. We therefore remodelled the CACI Paycheck data to remove the impact of housing benefit. 2. 3.
5. House price paid data	1.None 2. 3.
6. Existing unmet need	1.The current housing register includes those households already resident in social housing. If they are counted as being in unmet need because they require to move they will represent a need for affordable housing, but the turnover supply will not include these moves, so they have been excluded from the current unmet need. 2. 3.
7. Existing stock and planned supply	1.None 2. 3.

Key Issues Table 2 – Input assumptions

Key input assumptions	Key issues identified with the input assumptions
1. Affordability criteria	1. None 2. 3.
2. First time buyer (FTB) assumptions	1. None 2.

Key input assumptions	Key issues identified with the input assumptions
	3.
3. Percentage of households eligible for owner occupier tenure that decide to go on and buy	1. None 2. 3.
4. Five-year financial forecast for key variables – income, rent and house prices	1. None 2. 3.
5. Calculation of intermediate housing (IR and LCHO)	1. None 2. 3.

Key Issues Table 3: Calculations and outputs

Calculations / outputs	Key issues identified with the calculations / outputs
1. Market housing need covering owner occupier and private rented sector	1. None 2. 3.
2. Affordable housing need covering social rent and immediate housing	1. None 2. 3.
3. Scenario testing tables	1. None 2. 3.
4. Five year outputs / 10 year outputs	1. None 2. 3.

Appendix B – Output summary tables from the LHMA tool

Bespoke Local Growth Scenario Projections

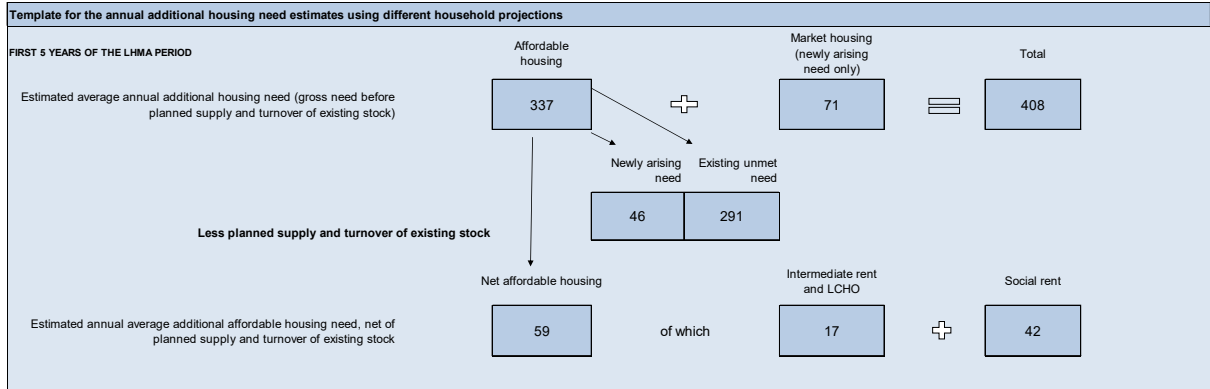
Data items / Key assumptions						
	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	30%
Social rent affordability criteria	35%

Data item	Data Sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	User Projections 1	

Percentage of households considered for owner occupier tenure that go on to buy	50%
---	-----

HMA assumptions					
HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent	
Sirhowy Valley Area	£ 85,905	3.6	£ 14,889	£ 19,383	
Ebbw Fawr Valley Area	£ 81,084	3.6	£ 17,154	£ 23,095	
Upper Ebbw Fach Valley Area	£ 81,826	3.6	£ 15,347	£ 19,769	
Lower Ebbw Fach Valley Area	£ 67,241	3.6	£ 16,005	£ 20,561	
	5	3.6			
	6	3.6			
	7	3.6			
	8	3.6			
	9	3.6			
	10	3.6			
	11	3.6			
	12	3.6			
	13	3.6			
	14	3.6			
	15	3.6			
	16	3.6			
	17	3.6			
	18	3.6			
	19	3.6			
	20	3.6			



Basis of the household projections

User Projections
1

Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

HMA	(a)	(b)	(c)		(d)	(e)	(f)	(g)	(h)
	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	four+ bedrooms	Social rent	Intermediate rent	LCHO	Affordable Housing
						(a) + (b) + (c) + (d) = (e)			(h) = (e) + (f) + (g)
Additional housing need estimates by tenure	32	-	-	9	9	42	10	7	59
Sirhowy Valley Area	8	-	-	-	-	8	2	1	11
Ebbw Fawr Valley Area	23	-	-	5	5	28	4	3	35
Upper Ebbw Fach Valley Area	-	-	-	1	1	1	2	2	5
Lower Ebbw Fach Valley Area	1	-	-	3	3	4	2	1	8
5	-	-	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-	-

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:
 *includes market and affordable housing
 *at HMA level
 *by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
 *annual estimate for the first 5 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	320	17	337	36	35	71	408
Sirhowy Valley Area	55	3	58	8	9	17	75
Ebbw Fawr Valley Area	125	7	132	12	11	23	156
Upper Ebbw Fach Valley Area	43	4	47	7	8	16	63
Lower Ebbw Fach Valley Area	96	3	99	9	7	16	115
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:
 *at HMA level
 *by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
 *annual estimate for the remaining 10 years of the LHMA period
 *the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)
 *the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.
 No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	35	10	46	36	35	71	117
Sirhowy Valley Area	7	2	10	8	9	17	26
Ebbw Fawr Valley Area	12	4	16	12	11	23	39
Upper Ebbw Fach Valley Area	7	2	9	7	8	16	25
Lower Ebbw Fach Valley Area	9	2	11	9	7	16	27
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

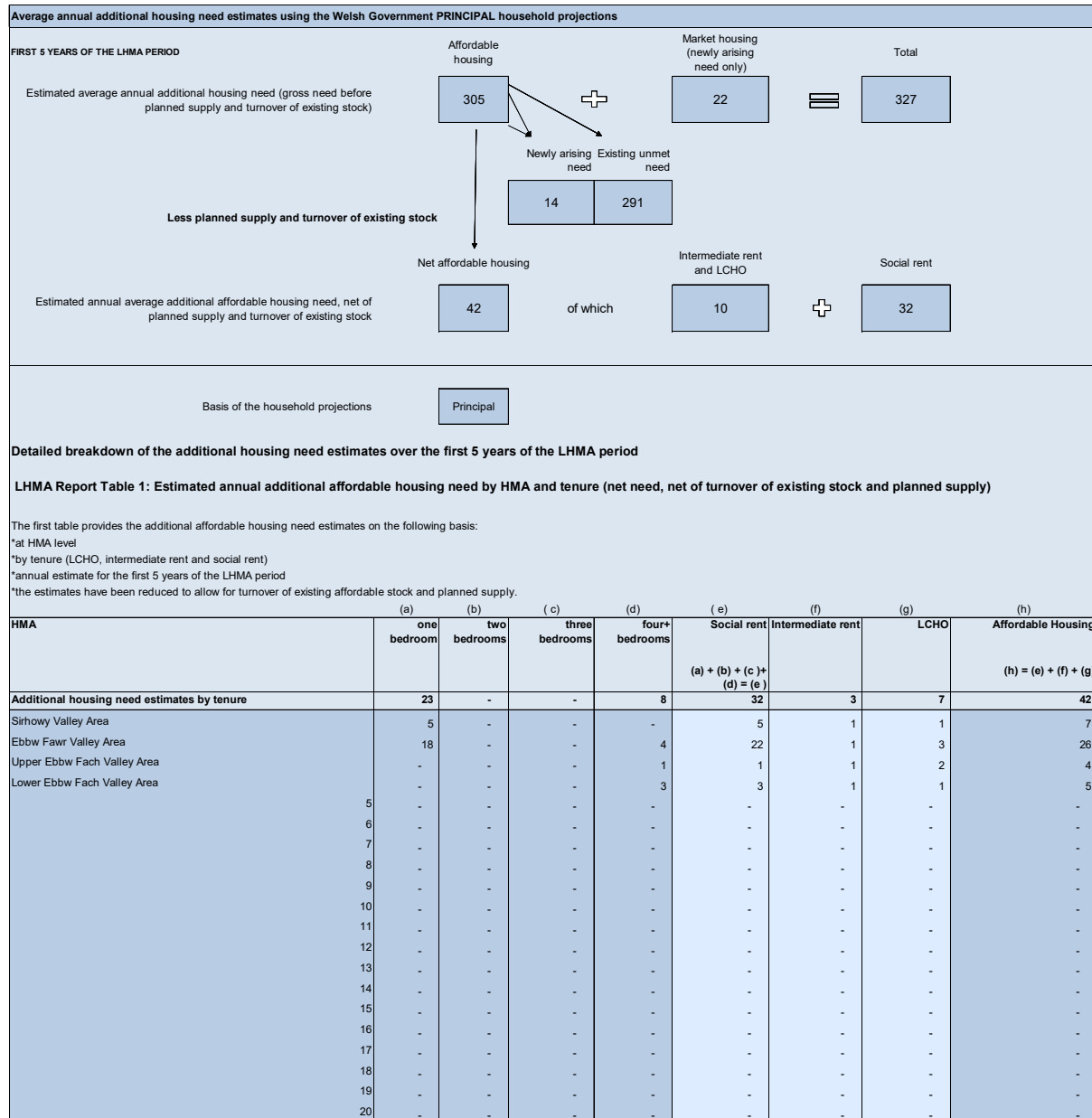
*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	37	13	50	560	191	750
Sirhowy Valley Area	8	2	10	116	36	152
Ebbw Fawr Valley Area	17	5	22	254	74	328
Upper Ebbw Fach Valley Area	5	3	8	78	40	118
Lower Ebbw Fach Valley Area	7	3	10	112	40	152
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-
17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Welsh Government Principal Projections



LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	295	10	305	11	11	22	327
Sirhowy Valley Area	50	1	52	2	3	5	57
Ebbw Fawr Valley Area	117	4	122	4	3	7	129
Upper Ebbw Fach Valley Area	38	3	41	2	3	5	46
Lower Ebbw Fach Valley Area	90	2	91	3	2	5	96
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	11	3	14	11	11	22	36
Sirhowy Valley Area	2	1	3	2	3	5	8
Ebbw Fawr Valley Area	4	1	5	4	3	7	12
Upper Ebbw Fach Valley Area	2	1	3	2	3	5	8
Lower Ebbw Fach Valley Area	3	1	3	3	2	5	8
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

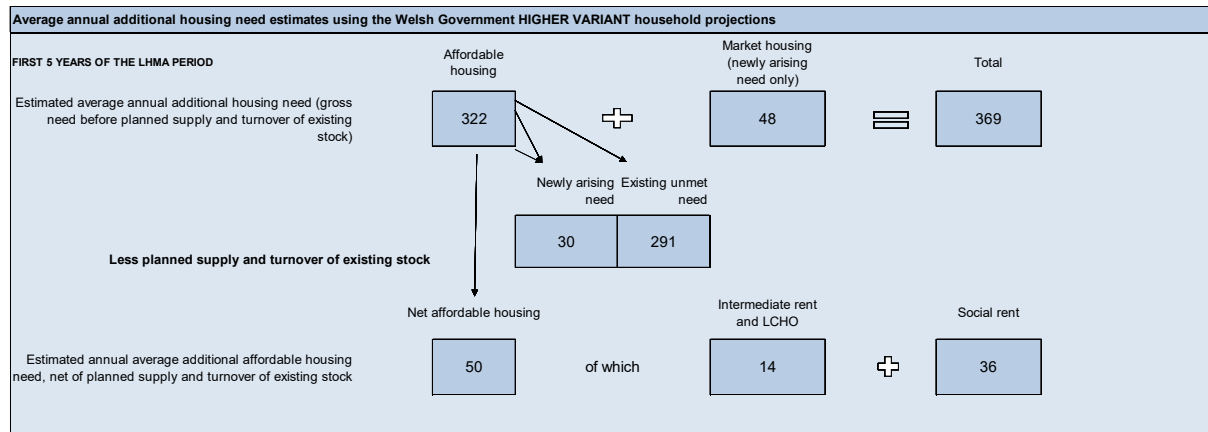
*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	18	5	23	266	82	348
Sirhowy Valley Area	3	1	4	49	14	63
Ebbw Fawr Valley Area	10	2	12	147	33	180
Upper Ebbw Fach Valley Area	2	1	3	27	19	46
Lower Ebbw Fach Valley Area	3	1	4	43	16	59
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-
17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Welsh Government Higher Variant Projections



Basis of the household projections

Higher Variant

Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Social rent (a) + (b) + (c) + (d) = (e)	Intermediate rent	LCHO	Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	27	-	-	9	36	7	7	50
Sirhowy Valley Area	7	-	-	-	7	1	1	9
Ebbw Fawr Valley Area	20	-	-	5	25	3	3	31
Upper Ebbw Fach Valley Area	-	-	-	1	1	1	2	4
Lower Ebbw Fach Valley Area	-	-	-	3	3	2	1	6
5	-	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	308	14	322	24	23	48	369
Sirhowy Valley Area	53	2	55	5	6	11	66
Ebbw Fawr Valley Area	121	6	127	8	7	16	143
Upper Ebbw Fach Valley Area	41	3	44	5	5	10	55
Lower Ebbw Fach Valley Area	93	3	95	6	5	11	106
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	23	7	30	24	23	48	78
Sirhowy Valley Area	5	1	6	5	6	11	17
Ebbw Fawr Valley Area	8	3	10	8	7	16	26
Upper Ebbw Fach Valley Area	5	1	6	5	5	10	17
Lower Ebbw Fach Valley Area	6	2	8	6	5	11	18
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

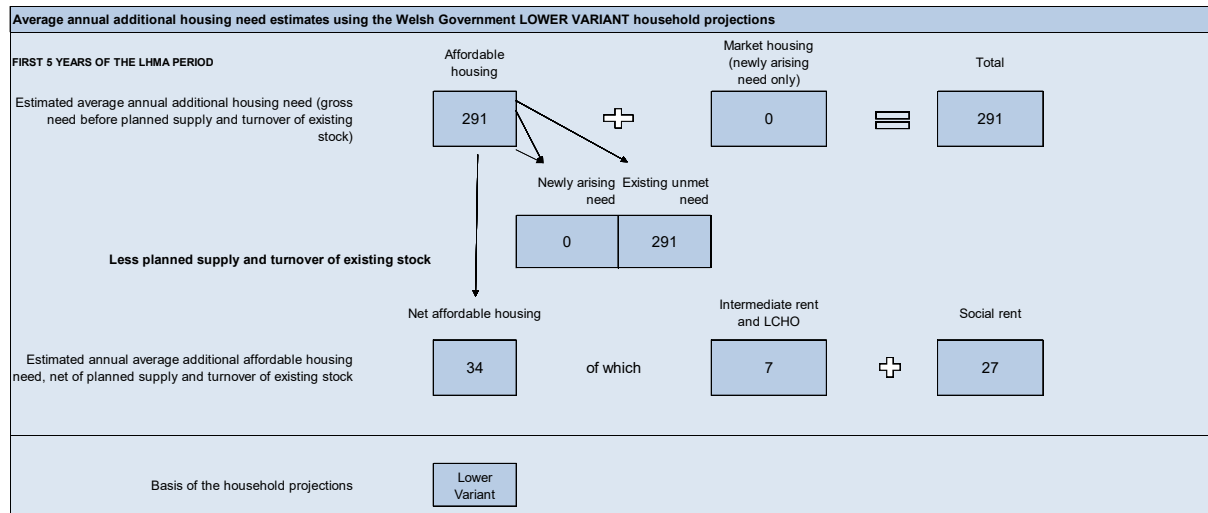
*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	28	9	37	415	138	553
Sirhowy Valley Area	6	2	7	84	25	109
Ebbw Fawr Valley Area	13	4	17	202	54	257
Upper Ebbw Fach Valley Area	4	2	6	53	30	83
Lower Ebbw Fach Valley Area	5	2	7	76	29	105
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-
17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Welsh Government Lower Variant Projections



Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Social rent (a) + (b) + (c) + (d) = (e)	Intermediate rent	LCHO	Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	19	-	-	8	27	-	7	34
Sirhowy Valley Area	4	-	-	-	4	-	1	5
Ebbw Fawr Valley Area	16	-	-	4	20	-	3	23
Upper Ebbw Fach Valley Area	-	-	-	1	1	-	2	3
Lower Ebbw Fach Valley Area	-	-	-	3	3	-	1	4
5	-	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	285	7	291	-	-	-	291
Sirhowy Valley Area	48	1	49	-	-	-	49
Ebbw Fawr Valley Area	114	3	117	-	-	-	117
Upper Ebbw Fach Valley Area	36	2	38	-	-	-	38
Lower Ebbw Fach Valley Area	87	1	88	-	-	-	88
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	-	-	-	-	-	-	-
Sirhowy Valley Area	-	-	-	-	-	-	-
Ebbw Fawr Valley Area	-	-	-	-	-	-	-
Upper Ebbw Fach Valley Area	-	-	-	-	-	-	-
Lower Ebbw Fach Valley Area	-	-	-	-	-	-	-
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	9	2	11	137	34	171
Sirhowy Valley Area	1	0	2	19	4	23
Ebbw Fawr Valley Area	7	1	8	99	15	114
Upper Ebbw Fach Valley Area	0	1	1	4	10	14
Lower Ebbw Fach Valley Area	1	0	1	15	5	20
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-
17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Appendix C – Analysis of change in the additional housing need estimates

Annual additional housing need estimates	Column index	Current LHMA	Previous LHMA
		Over the first five years of the LHMA period	
Total housing need estimate	(a)	408	821
Market housing	(b)	71	64
Affordable housing	(c)	337	757
Percentage split of additional housing need by market and affordable housing	(b)/(a): (c)/(a)	17:83	8:92
Annual planned supply and turnover of existing stock for affordable housing	(e)	738	671
Affordable housing need – net of planned supply and turnover of existing stock	(f) =(c)-(e)	59	150
Annual additional housing need estimate split by tenure:			
Owner occupier	(g)	36	N/A
Private rented sector	(h)	35	N/A
LCHO – net basis	(i)	7	21
Intermediate rent – net basis	(j)	10	N/A
Social rent – net basis	(k)	42	129
One bedroom social rent	(l)	32	223
Two bedrooms social rent	(m)	0	-49
Three bedrooms social rent	(n)	0	-74
Four+ bedrooms social rent	(o)	9	30
Market housing percentage split: Owner occupier estimate Private rented sector estimate	(g)/(b) (h)/(b)	51:49	N/A
Affordable housing need percentage split: LCHO Intermediate rent Social rent	(i)/(f) (j)/(f) (k)/(f)	12:17:71	19:81

Social housing need percentage split by number of bedrooms			
1 bed	(l)/(k)	76	88
2 beds	(m)/(k)	0	0
3 beds	(n)/(k)	0	0
4+ beds	(o)/(k)	24	12

Data Input and Key assumptions	Current LHMA	Previous LHMA
	Over the first five years of the LHMA period	
Number of HMAs and basis of defining HMAs (ward, MSOA, LSOA)	4 HMAs based upon the housing markets for the 4 main towns in Blaenau Gwent	Ward level so 16 areas in total,
Selected household projection basis	Bespoke Local Growth Scenario projections	Welsh Government 2014-based 10 year migration trend model
Annual newly arising need	46	33
Rent data – state default or source used	Default	VOA and Welsh Government
House price paid data – state default or source used	Default	Land Registry
Income data – state source used	CACI Paycheck adjusted to removed housing benefit	CACI Paycheck adjusted to removed housing benefit
Annual existing unmet housing need	291	214
Market housing affordability criteria	30%	25%
Social rent affordability criteria	35%	30%
Percentage of those considered appropriate for owner occupier that go onto buy	50%	N/A
Average FTB property price for the LA	£79,000	£65,000
FTB property value to income ratio for the LA	3.6	3.5
Five-year financial forecast – OBR or alternative source	OBR	N/A
Split of intermediate housing need – method 1, 2 or 3	1	N/A